

# **Listen Local: Research on Music in Denver**

## **Draft Technical Report**

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# Executive Summary

## Introduction

Denver residents regularly intersect with signs of a robust music community. Along Colfax Avenue and South Broadway, audiences pour out of independent music venues; the local press carries a growing number of advertisements for live music performances; music stores such as *Twist and Shout* and *Wax Trax* have become local landmarks. There is a sense that Denver must have a vibrant music scene, but until now, little research has been conducted to document the breadth and depth of the music activity occurring in Denver. This study of Denver's contemporary music community provides quantitative and qualitative data that confirm Denver has a vibrant and growing music community that is an economic asset to the city.

## Study Purpose

This study was commissioned to measure and document the breadth and depth of Denver's music communities. The study provides data that document the robustness of those communities and measure their contributions to Denver's economy. The study findings are intended to inform policymakers who are considering whether and how the City of Denver can sustain and nurture these music communities and thus benefit from the financial rewards associated with them.

## Scope

This study of Denver's music community considers data from various parts of the music community; however, the qualitative component of the study is centered on the community's independent music segment, which is one of the most visible and inter-city economically competitive parts of the scene. The study's Creative Vitality Index (CVI) portion contains reports and analyses of data streams that document activity in areas such as nonprofit music jobs, nonprofit music participation, record sales, musical instrument sales, and for-profit music related jobs. Thus, although this study concentrates on a certain area of Denver's music scene, it covers the whole scene.

## Method

This study employed two means of collecting data. The first was an analysis of music-related data that flowed from the Creative Vitality Index (CVI), a study conducted each of the last three years for the City of Denver. The CVI provides a snapshot of the relative economic strength of a region's creative economy, including the for-profit as well as the nonprofit creative sectors. The index is rooted in

national-level data streams, and music-related activity is included as a component. The second method used in this study was qualitative analysis. This section of the study analyzed the contents of 18 interviews with key participants in Denver's music communities. The analysis of these interviews, combined with an analysis of the quantitative data presented through the CVI, provided findings that can serve as a reasonable basis for policy development. In addition, the data and findings raised important questions for future research.

## **Findings**

The principle findings of the study are:

- Denver's music-related CVI value is strong both in comparison to the CVI for states in the Mountain West (3.2) and also the nation (2.5). The national average is a value of "1."
- Denver's music-related CVI value is higher than those of Seattle, Austin, Chicago, and Portland.
- Denver has a broad-based supportive infrastructure for music. The numerous available venues, the large number of music consumers, the high quality of bands/musicians, and the meaningful media coverage of music are all critical to the health of the scene.
- The limited cooperation between music and other arts endeavors in Denver is viewed by leaders in the music community as a drag on the future growth of Denver's music sector.
- Effective cooperation and communication within sectors of Denver's music scene is a significant asset.
- Denver bands have had success touring nationally, but Denver's geographic isolation remains a challenge to sustained touring activity, which is considered vital to success.

## **Additional Findings**

- The national data streams incorporated into the Creative Vitality Index (CVI) revealed the following economy-related findings. In the City of Denver in calendar year 2008:
- Musical instrument stores reported over \$12.5 million in sales, or, \$21 per person. This is a per capita rate greater than Seattle (\$17), Portland (\$15), and Austin (\$18)

- CD and record stores reported over \$6 million in sales, or, \$10 per person. This is a per capita rate greater than Seattle (\$8), Portland (\$8), and Austin (\$8)
- Musical groups and artists reported over \$25.2 million in revenues, or, \$42 per person. This is a per capita rate greater than Seattle (\$38), Portland (\$26) and Austin (\$25).
- Nonprofit music-related organizations reported over \$28.6 million in revenues, or, \$48 per person. This is a per capita rate equal to Seattle, though greater than Portland (\$28) and Austin (\$14).
- Music-related occupations in Denver accounted for more than 2,300 jobs, compared with 6,093 in Seattle, 3,281 in Austin, and 3,443 in Portland. While there are lower total employment levels, Denver has a higher concentration than any of these cities on a per capita basis
- In Denver, the average expenditure on music-related items was \$73 per capita, which is more than twice the national average for such expenditures
- In Denver, residents spent approximately \$48 per person on nonprofit music activities, a rate three times the national average
- In Denver, employment in music-related jobs is over twice the national average

### **Policy Recommendations**

Based on the findings of the research, and assuming Denver city leaders would like to foster the development of the city's music communities, several policy recommendations have been formulated. These policy recommendations are:

In order to retain its place as a competitive location at which to create and consume music, Denver should design and implement strategies that support music into its economic and cultural development plans.

In order to overcome the negative impact of Denver's geographic isolation on the development of its music community, the city should identify ways to foster the touring of Denver musicians. Such touring activity builds Denver's brand as a center for music and creates a system that brings out-of-region dollars into Denver's economy.

Denver policymakers should explore inter-arts communication and collaboration. Inter-arts collaborations can cost-effectively create new music opportunities and spark important synergies in the development of other art forms. Collaborations with other economic (non-artistic) sectors should also be encouraged.

The City of Denver should invest in a planning process and develop a multi-year plan to revitalize/reinvent the festivals that occur on city property with a goal of increasing local quality music in such festivals.

Funding, space, and other resources to support the growth of Denver's music communities should be made available in an open and competitive manner.

### **Additional Research**

The findings of this research provide a foundation for the anecdotal belief that Denver is a city with a robust music scene. Additional research would expand knowledge of this scene, and better position the city to develop this segment of its creative economy. The following research questions are suggested as areas for further study. All the questions are rooted in an assumed desire for Denver to know more about the dynamics of its music sector in order to nurture and build it.

- What are the economic import/export dynamics of Denver's music community?
- How could music in Denver be developed to be far more significant?
- When musicians move to Denver, how do they enter the scene? At what points do they experience success or failure?
- When Denver musicians attain national success, do they choose to live in Denver? Why?
- How is diversity in the music community characterized? Does the diversity in the music community reflect that of the city? Does the diversity parallel the city's commitment to cultural and social diversity?
- Is there a "Denver" identity associated with music in the city?
- What strategies for success have been deployed by members of Denver's music community?

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## Introduction

This study was commissioned to quantify the employment and economic dimensions of music activity in Denver. It was also commissioned to identify and better understand the underlying dynamics of music activity in Denver. The study found that Denver's local music scene is strong, even compared to music activity in cities that are far better known for being centers of music. In fact, the study identified a number of indicators that signal a very robust level of local music activity, which suggests that the music scene could be nurtured to become an even greater contributor to the Denver economy.

For readers who may be initially surprised at the strength of Denver's music activity, it may be helpful to review how and where this activity occurs. First, Denver is and has been home to a number of small-scale yet important music festivals. Some examples include *Monolith*, *City Park Jazz*, *The Underground Music Showcase*, *the Mile High Music Festival*, and the *Westword Music Showcase*. These festivals, and others, attract thousands of audience members each year and provide important opportunities to showcase local musicians alongside national acts. In addition, Denver has the benefit of being a regional base for both Live Nation, the top music promoter in the country, and AEG Live, another major national player in the live music field. All told, Denver has 44 music venues and at least 60 additional mixed-used establishments that offer live music every night of the week.<sup>1</sup>

Denver's performance and venue infrastructure is supported by local newspapers and niche publications along the Front Range that devote considerable attention to Denver music. Less visible, but of similar import, are Denver's numerous music blogs, some of which have received national acclaim. The Denver area is also home to a number of professional recording studios, many of which record local acts exclusively. Another part of the music infrastructure's foundation is the University of Colorado Denver's Music and Entertainment Industries Studies program, which does research on the industry and serves as a source of skilled music professionals. Denver's music prosperity can also be confirmed by the recent successes of bands such as *The Fray*, *Flobots*, *Devotchka*, and *Rose Hill Drive*. Rising stars in the music scene are routinely showcased at Austin's *South by Southwest* and the *CMJ* music festival in New York.

The above-mentioned factors *anecdotally* support data from past Creative Vitality Index (CVI) quantitative studies of Denver. Those studies highlight a strength in the area of music. A *systematic* documentation of the qualitative factors that underpin

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<sup>1</sup> The precise number of venues that at some point showcase live music is difficult to assess. Community websites such as yelp.com and gigbot.com, media outlet music calendars at denverpost.com and westword.com, and the industry data site pollstar.com were reviewed to provide an estimate of the ample venues in the city.

the CVI findings will provide a more in-depth perspective of Denver's strength in music. This study functions as a complement to the Denver CVI by offering a broad view of the structure of Denver's music activity that numbers alone can't provide. A more concentrated and thorough depiction of the music community can help focus the use of CVI data and should help economic development leaders educate the community about the music dimension of Denver's creative economy. This study can also serve as an important source of new information for arts advocacy and messaging. Finally, this study will allow annual CVI reports to be used more effectively in policymaking, for both the Denver Office of Cultural Affairs and the city as a whole.

### **Need for the Study**

There are three reasons this research was commissioned. The first is that there is ample but unsystematic evidence that Denver supports a growing, vibrant community of musicians. There is considerable empirical support for the argument that musical activities have meaningful direct and indirect economic benefits for Denver. However, outside of reliable data streams as reported through the CVI, we know little about the underlying structure of what supports this robust scene. The second reason for commissioning this research is that Denver's economic and cultural policymakers would benefit from a better understanding of the precise nature and contributions of Denver music to the local economy. The last reason for this research is that many U.S. cities that are known for their economically vibrant music communities have already conducted similar research. The policy value of these other cities' studies is limited in Denver because they are highly city-specific. This study improves upon existing city music studies by incorporating a qualitative research component. This dimension of the research design generates the type of richly descriptive data that not only inform policy decisions, but also convey study findings in a compelling and publicly accessible form.

### **Two Perspectives on Music in Denver**

Because this study uses two core sources of data, it provides two different yet complementary perspectives on the Denver music scene. The first perspective is provided by the Creative Vitality Index (CVI). The CVI is an annual measure of the health of the arts-related creative economy in a specified geographic area. The CVI defines an area's creative economy as including for-profit and nonprofit arts-related creative enterprises and the key support and service activities that sustain them. The CVI is anchored in an aggregation of established, longitudinal, and annually maintained data sets that have been determined, through research and analysis, to serve as an indicator of the vitality of an area's arts-oriented economy.

Data from the CVI in this music-specific report identify such factors as the percent change in music-related jobs in Denver from 2006–2008. These jobs are reported regardless of musical genre because they represent occupational employment figures. In addition, data were pulled from Pollstar.com, a music industry trade



publication that tracks and publicizes data on ticket sales, venues, concerts, and other data, which are used to further define the breadth of the music scene and its economic impacts.

The second view is more specialized and is primarily derived from qualitative interview data. This study looks at how local music is created, recorded, distributed, sold, covered by local and national media, and presented outside of Denver. While not all genres of music are represented in these data, several major players in the music community were interviewed and their perspectives are represented here. Qualitative data are used here in conjunction with the quantitative data of the CVI to present a detailed and inclusive view of music in Denver.

In this report, the term “music community” is broadly inclusive. It is used to refer to musical activity in Denver regardless of genre or any other sub-categorization of music. The quantitative data used here are economic. For example, Denver’s music community is understood to be the entirety of musical activities occurring in Denver as measured by the CVI. Qualitative data are derived from central figures in Denver’s music community, including both individuals who participate in specific communities (e.g. jazz or indie rock) and those who are only generally related to music (e.g. music store owners or promoters). “Music community” is used consistently to indicate a wide view of music in Denver; specific scenes are directly referenced when discussed.

### **Creative Vitality and Urban Economies**

Current trends in urban economic development policy related to creative activities are informed by theories that identify the arts as an important source of economic activity and economic advantage. (Florida 2004; 2005; 2007; 2008; Franke and Verhagen 2005; Hessler and Zimmermann 2008); Landry 2000; Zukin 1996). The argument is that creative activities—from the creation and consumption of art to related creative works (e.g. graphic design professional working for non-art firms)—constitute a *creative economy*. This sector of the economy is claimed to not only generate direct positive economic activity, which can be substantial, but its existence also helps attract highly-educated and often young individuals, a population that post-industrial cities clamor to attract.

A leading academic and public voice in this way of thinking about the arts and economies is Richard Florida. At the base of Richard Florida’s argument is that people will choose “place” over “jobs” if they have the luxury of doing so. He argues that cities should work to develop human capital before financial capital, and that industry will follow the creative class. He posits that contemporary cities facing the challenges of deindustrialization, globalization, and digitization must rely on this new *creative class* (Florida 2004) in order to survive (Landry 2000). Florida’s popular book *The Rise of the Creative Class* (2004) and subsequent books on the creative economy (Florida 2005; Florida 2007; Florida 2008) propose a commitment by cities of all sizes to the arts specifically, and to creativity more

broadly defined. His call for urban climates that appeal to creative classes has encouraged the establishment of urban policies aimed at enhancing or establishing arts-related funding and infrastructure.

While Florida is often criticized for the nearly all-encompassing list of individuals he identifies as "the creative class," the importance of creative economic inputs to the competitiveness of regional economies remains a salient topic within the fields of economic development and arts management (Throsby 2002). Florida can be credited with positioning, advocating and popularizing the concept of the creative economy. His impact on field has been pervasive enough for the creative economy to become an accepted dimension of the overall economy and a feature of any progressive economic development plan.

### **Recent Music Studies: Importance and Limitations**

As cities have awakened to the potential of building more robust creative economies, they have increased their focus on music as a sometimes highly-visible component of such an economy. Music is viewed as a distinctly important arts community activity that brings with it unique economic benefits. This interest has encouraged major research on music and economic vitality in Seattle, Chicago, Nashville, Austin, and cities in Georgia. These studies precede this first study of Denver's music scene, but much can be learned from them and their shortcomings.<sup>2</sup> The 2008 Seattle music economic impact study and 2007 Chicago music activity study are exemplars of this research, replicating or improving upon studies in other cities. For that reason they are presented here.

The most recent and perhaps comprehensive of these studies is the 2008 economic impact report commissioned by the Office of Film and Music in Seattle. This the latest in a series of music studies in Seattle (see also 1993, 1994, and 2004).<sup>3</sup> The latest research, conducted by geographers at the University of Washington, examines the impact of music on the economies of King County and Seattle. The study focuses on 1) music related employment and 2) markets and consumption of Seattle music. Like the 2004 study commissioned by the city, the 2008 report identifies music as an important contributor to both Seattle and King County; the 2008 study is innovative in that it attempts to measure the impacts of "self-employed musical activities" (Beyers 2008; William Beyers 2008). The study is also ambitious in its attempt to identify local, regional, national, and global economic activities related to music. The researchers admit that attempts to measure self-employment and the markets of music—for example, the local or global

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<sup>2</sup> Denver is later compared to these cities based on our own research design, rather than on the findings from these studies.

<sup>3</sup> The 2008 Seattle study confirms previous research findings in Seattle and improves upon previous designs. Therefore a discussion of these studies would be redundant.

consumption of Seattle-based music—suffer from a lack of data. However, the inclusion of these areas in impact studies is important in its own right.

The 2007 Chicago Music Commission study of musical activity is also relevant to this study. Unlike the strict economic focus of the aforementioned Seattle study, research in Chicago was conducted to understand “musical activity” in the city. This included statistics gathered from Pollstar.com on, for example, the number of seats in venues in the city, numbers of performing musicians, and so on. The point of the research was not to analyze just the economic impacts of music, but to measure the vigor of such activity in the city. In fact, the research pales in comparison to the Seattle study in terms of its rigorous assessment of the economic impact of music. The study also compared musical activities in Chicago to music activity in other cities.

These and other music-focused studies (Austin 2001, Georgia 2002 and 2005, and Nashville 2006) are directly and indirectly relevant to this project. Directly they buttress the claim that serious interest in systematic research of musical activities is high in cities known for their music communities. Indirectly, and perhaps more importantly, they constitute an emerging literature on “best practices” in research on the role of music in cities. For example, they provide examples of how key terms in the research, such as “music community” or “music industry” or “economic impact,” might be operationalized. These reports also reveal the limitations of existing methodologies or data sources, such as the difficulty of accessing and collecting important statistics. For example, there is a lack of statistical information on the economic contributions of part-time musicians who are employed in other occupations. Additionally, most of these studies articulate plans for further study. Such plans can be considered by researchers when formulating new studies of music and cities. For these and other reasons, previous music studies are important.

However, because these studies rely solely on descriptive data, there can be no generalizations derived from their findings. We cannot know, for example, the economic impact of musical activities in Denver by studying the findings for Seattle. Instead, we can only use this research to formulate general but flexible research designs. Until additional data or methodologies exist, research on music and cities will occur on a per-case basis.

## **Research Design**

This study employed a triangulated research design (Berg 2009; Denzin 1989) to study Denver’s creative vitality in the area of music. Using this approach, conclusions drawn from three different research techniques—two quantitative analyses of existing data and a qualitative design—were used to elicit core data for this report.

## Research Questions

Some broad questions about music in Denver guided this research. For example, the researchers wished to better understand the perceived and actual strengths and weaknesses of music communities in Denver. The researchers also wished to know more about the impact of the digitization of music on the music industry and how general transformations in the music industry have affected Denver. Because music and urban development are often theorized to be connected, the researchers wanted to test this theory. Finally, in addition to gaining a better understanding of the economic dimensions of music in Denver, an additional objective of the questions was to consider whether or not there is a specific *identity* connected with Denver as a music town.

These research questions were meant not only to assess general trends, but also to determine how key musical figures in Denver think about music. Therefore, answering these questions required quantitative techniques capable of capturing general trends and qualitative methods that reveal people's actions and beliefs about music. Critically, these questions were also constructed to produce policy data.

## Quantitative Design

The quantitative data for this study came from the Creative Vitality Index (CVI). The CVI was commissioned by the Denver Office of Cultural Affairs (DOCA) to measure the overall economic health of Denver's for-profit and nonprofit creative economy. For this study, the music-related elements of the 2008 Denver CVI were extracted. WESTAF analyzes CVI data after filtration by two primary data collectors and analysts: the Urban Institute's National Center for Charitable Statistics (NCCS), and Economic Modeling Specialists, Inc. (EMSI). These data sources allow for consistent national level data streams that can be analyzed across regions, cities, counties and states. This allows for consistent comparison data across multiple geographies, such as the county level music CVI comparisons included within the findings section of this document.<sup>4</sup> More information about each of these data sources is included within the appendix.

Through these data sources, the CVI measures the overall economic health of a region through per capita analysis of information from 10 distinct 6-digit NAICS (North American Industrial Classification System) codes, 44 distinct NTEE (National Taxonomy for Exempts Entities) Core Codes, and 36 distinct SOC (Standard Occupational Classification) codes. While the data related to these codes are aggregated in ways to represent the core theoretical measurement within the greater creative economy, a number of these codes attempt to measure the economic output of music as an art form. Within this framework, music-related nonprofit and industry data are measured through sales of music-related goods,

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<sup>4</sup> See appendix for additional information.

revenues from musical groups, revenues from nonprofit music-related arts organizations, and occupational employment for music-related jobs.<sup>5</sup> A complete list of categories and codes are included within the appendix.

Within this analysis, nonprofit data alone have genre specificity, and only in relation to measuring institutions that qualify themselves as Symphony Orchestras or Opera, Singing, or Choral Groups. No industry and occupation codes are genre-specific. Several of these components are not exclusive to music as the artistic medium that they represent, though a vast majority of these components are primarily focused on music. Generally, the economic data associated with music industry inputs are free of any genre bias.

These music-related components fit within the weighting system and design behind the Creative Vitality Index, the underlying theory of which suggests that public participation in the arts or public demand for arts experiences and events ultimately drive funding levels, which in turn support artists and arts-related jobs within the economy. Given the ability to apply the same theory to music data as available within overall CVI data, a similar weighting system has been applied to each section of music related revenue and jobs data.

While the CVI does not purport to be a comprehensive view of economic activity related to the music industry in Denver, it does provide consistent data streams that are comparable for any county-based geography in the nation. The nature of these data streams make them suitable for sampling and indexing what is happening within the Denver music economy over time. When the per capita strength of these data streams is compared to the same measurements within the nation and the region, the relative strength of economic activity related to music within Denver can be assessed. While this measure of economic activity is not comprehensive and will exclude a number of underground, unreported, and relational activities, this sample of major activities that are picked up within the data are likely to have a positive correlation with activities that are not picked up within the data. For example, while the economic value of volunteer hours being performed at the local community radio station is not directly included in the index, the measurement of the relative health of nonprofit radio stations is seen as the relevant measurement. It would be assumed that establishing strong volunteer bases could be a contributing factor to a positive Index value in this category, though this research is not aimed at establishing this type of relationship.

## **Qualitative Design**

The primary qualitative method employed in this study was ethnographic interviewing. A sample of 18 individuals who are central participants in Denver's music communities was established. These individuals were invited to participate in interviews lasting between one and three hours in duration. The interviews were

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<sup>5</sup> See appendix for additional information

semi-structured, meaning an interview schedule of questions was followed; however, participants were also given the opportunity to address any related topics they found important and to elaborate extensively on the interviewer's questions.<sup>6</sup> This technique yielded nearly 30 hours of interview data.

A theoretical sampling was used to generate a list of potential respondents. This sampling strategy involves the researcher making an informed decision about where to begin data collection, either based on prior knowledge of the field or insights in scholarly literature. In this study, participants were selected because of their status as "gatekeepers" in Denver music communities. These were defined as individuals who had specialized knowledge of some aspect of Denver music and who had considerable experience derived from working in the industry. For example, participants owned local music stores, performed in nationally recognized Denver bands, worked for media outlets that covered music, worked for music venues, promoted national and local acts, and so on. In this study, musical genre was not a criterion for selection. However, in future studies it will be important to ensure that a wide cross-section of participants is surveyed.

The qualitative findings were analyzed with the aid of NVivo, a qualitative data analysis software. This industry standard software allows researchers to store, manage, and prepare for presentation large sets of raw qualitative data such as field notes, interview transcriptions, photographs, videos, and so on. The software aids in analytical code creation, diagramming of data points (or "nodes"), and theory-building through comparative analysis of the data. The analysis was conducted using a grounded theory approach (Charmaz 2006; Glaser and Strauss 1967). Grounded theory stresses the importance of drawing conclusions from the data not deductively (e.g. based on hypotheses), but inductively. An inductive approach begins concept-building and ultimately theory-building with data, and the empirical phenomenon of study is the constant referent of concepts that emerge from the analysis. The approach ensures conclusions drawn from the data are *grounded* in actual data, rather than theories, prejudices, or other sources of bias.

From these two analytical methods emerged three master themes: a) positive and negative aspects of Denver's music scene; b) the place and character of Denver's music scene; and c) transformations and innovations in music. These are defined in detail in the findings and analysis portions of this study, and additional categories and subcategories are also defined and discussed. The analysis of the data resulted in clear and supportable findings, and provided a reliable basis for policy development. The findings and analysis also raised important questions for future research.

Finally, the researchers' knowledge of music communities in Denver was derived from both extensive personal participation in (as musicians) and scholarly observation of the scene. Both firsthand and scholarly knowledge was relied on to

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<sup>6</sup> See appendix for additional information

evaluate the face validity of the interview data, as well as to lend a greater understanding of the context to the interviews. The researchers were thus able to comprehend interview data as part of a larger narrative on music in Denver. These understandings are not reflected in this report's analysis as much as in the interpretations of the findings.

## Findings

I don't see the themes until the Qualitative Results section below, where they are reintroduce. Should this paragraph be deleted here? -Max Karson 12/2/09 7:52 AM Three major themes emerged from the analysis, and they are presented and elaborated on here. First the themes and categories are defined, and then an overall analysis of music in Denver is presented. The quantitative and qualitative data are separated here, but both designs inform the subsequent analysis.

### Quantitative Results

In this section, two findings are reported. The first contains music-specific data from the CVI. Because three years of CVI data exist for Denver, these data are presented as initial trend data.

When measuring music-related economic inputs as defined within the previous section, Denver's Music Creative Vitality Index for 2008 was valued **2.33**. This means that on a per capita level Denver was over two times greater than the nation as a whole when considering the revenue and occupational inputs included within the Music CVI. This indicates strength within Denver's creative economy and the economy as a whole when considering only economic inputs related to music.

Trending data reveal that the Music CVI was **2.37** in 2006, **2.23** in 2007 and **2.33** in 2008. The data reveal a general decrease in sales of creative products and creative jobs between 2007 and 2008. This decrease is suspected to be the result of the global economic downturn in 2008. While this decrease was also present in Denver, the Index value for these categories actually increased significantly for Denver between 2007 and 2008. This means, while overall employment and jobs decreased during this time period, Denver music economic measurements included within the CVI fared better than the nation as a whole on a per capita basis. While the causal relationships for the strength of these economic numbers are not described by these data, the data do provide evidence that Denver continues to have strong indicators of creative economic activity for music related inputs.

### Comparative CVI Data

When considering CVI data in comparison to other cities, Denver's Music CVI values

compare favorably and indicate a robust sector.

**Table One: Comparison of Music CVI**

City/County	Music CVI
Los Angeles (county)	4.24
New Orleans (Orleans Parish)	2.89
Denver (county)	2.33
Seattle (King county)	2.06
Baltimore (city/county)	2.02
Portland (Multnomah and Washington Counties)	1.55
Austin (Travis County)	1.50
Chicago (Cook County)	1.40
Dallas (county)	1.34

Preliminary results for the full 2008 CVI study also indicate that Denver has a relatively strong creative economy overall when compared to the rest of the nation. In addition, the CVI data confirm that Denver is a major cultural hub for the Mountain West.

The per capita economic inputs for the CVI for Denver when compared to the seven state region identified as the Mountain West.<sup>7</sup> The 2008 Denver CVI value is 3.2. This index value indicates that Denver's creative vitality is three times that of the Mountain West. Although determining the specific contribution of music to the overall CVI would require a comparison of music inputs subtracted from the data over multiple geographies, the calculation and the general strength of the Denver music CVI value suggests that music contributes considerably to Denver's overall CVI value.

In addition, the overall 2008 Denver CVI value is 2.5, significantly above the nation's 1.0. This finding illustrates that Denver is a strong center for the creative economy. While Denver's overall CVI value is not as strong as what is shown for the entire Mountain West, the index value of 2.5 indicates that the concentration of economic activities related to arts participation and jobs is at a higher level in Denver than the rest of the nation on average. This indicates that Denver is a center for cultural economic activity, not only in the Mountain West Region, but over the nation as well.

### **Descriptive Statistics**

The following tables report occupational data specific to music and music-related employment in Denver. These data report that employment within these

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<sup>7</sup> See appendix for additional information



occupations increased by approximately 1% from 2006 – 2007 and, along with other occupations, was affected by the global economic downturn from 2007 – 2008, showing a 1% decline.

### **Music Occupational Data 2006-2008**

Employment Type	2006 Jobs	2007 Jobs	% Change
Radio and Television Announcers	429	416	-3.03
Music Director and Composers	577	586	1.56
Musicians and Singers	1033	1053	1.94
Audio and Video Equipment Technicians	216	218	0.93
Sound Engineering Technicians	79	76	-3.8
Musical Instrument Repairers and Tuners	42	42	0
Total	2376	2391	0.9

Employment Type	2007 Jobs	2008 Jobs	% Change
Radio and Television Announcers	416	532	27.88
Music Director and Composers	586	528	-9.9
Musicians and Singers	1053	871	-17.28
Audio and Video Equipment Technicians	218	239	9.63
Sound Engineering Technicians	76	94	23.68
Musical Instrument Repairers and Tuners	42	41	-2.38
Total	2391	2305	-11

According to Pollstar.com, Denver has over 44 concert venues within the city, with a minimum total capacity of 120,971. The minimum aggregated gross average sales at these venues in 2008 was \$2,328,942. Additional research revealed at least 56 additional venues that support live music in some capacity.

As a collection of limited but critical data, these findings support the initial justification for this study that Denver's music community is indeed vibrant and contributes significantly to the city's overall economic health. The study's qualitative findings begin to articulate some of the substantive reasons for this success.

### **Qualitative Results**

Three master themes emerged from the coding the interview data. Each theme is

defined here, as are corresponding categories and subcategories.

### **First Theme: Positive and Negative Aspects of Music in Denver**

Initial coding of the interview transcripts concentrated on interviewee observations regarding the viability of music in Denver. A wide range of data was found in these comments and each code in this master theme speaks to either assets of the Denver music community or the liabilities of that community. Data in this master theme speak to practices that may have a beneficial or detrimental impact on the scene and to a lack of action(s) that might also have positive or negative consequences. For example, one respondent, a music promoter for *Live Nation*, remarked the following:

I think that somewhere we're going to have to learn how you can sell the card that is, the gift card to buy, to download the music that specifically does that. I think that that is probably going to be the challenge for local bands because, because you know I think you're going, it's getting your word out there and getting your music out there and having somebody take that piece home with them. What happens when people don't want to buy CD's anymore?

Exemplified in this statement is a suggested practice that could have positive impact but is not widely enacted.

Respondents' accounts were further divided into three categories: strategies for success (SS), infrastructure (IFR), and community (COMM). Each category more specifically provides insights into the strengths and weaknesses of Denver's music community. Each category is additionally subdivided into more precise codes.

#### *Categories and Subcategories*

The first category is labeled "Strategies for Success." The category is designed to capture strategies that are either employed or proposed for deployment in order to achieve some definition of success, be it monetary, artistic, or otherwise. Also, data collected in this subcategory speak to strategies that should be employed but are not, as exemplified by the previous data point from the Live Nation employee. Within this category, there are three subcategories: luck (SSL), community Building (SSC), and touring (SST). Each subcategory reveals in greater detail practices of the Denver music community that do or do not result in success. For an example of a "negative" strategy, consider this comment from an independent music storeowner:

[There are] too many promoters competing with each other which I mean, obviously competition is something that's essential to capitalism, but I think there's too many and it's actually driving the prices up not down. [Denver also has] no centralized downtown. That, that's why we're not Austin. It's because there is no 6th Street here [and] there is a sense of civic musical pride there.

This data point is characterized as an indication of an area of community-building that needs improving. Also evident here is an indictment of infrastructure, the second main category.

“Infrastructure” refers to money, buildings/venues, press (digital or print), or non-symbolic and non-ideological aspects of music in Denver. For example, a promoter for a small rock club remarked:

What's changed for [Denver] is the amount of venues and the amount of bands. So, it's been great for Denver because if you start a band right now, you can play a venue on a weekend night and have a good show, and make money. Real things are happening now for bands for the first time.

In this statement positive dimensions of Denver’s physical and financial music-related infrastructure are referenced. Additional infrastructure assets and liabilities appear in this category.

The final category in this master theme is “Community.” Community in this sense speaks less to the identity of Denver music communities and more to the practical value (or lack thereof) of community to music. The following quotes from two different individuals reveal the relationship of the subcategory “community within music scenes” to Denver’s overall strengths and weaknesses. A local music blogger remarks that:

That's one reason that I think the Denver music scene is so fascinating. I feel we are a pretty connected and supportive environment as a music scene, that we are all, kind of in our ways, the ones that are involved, trying to support and encourage each other.

Another respondent argues:

One of the long standing problems is here is...there is this whole cowboy thing here...And, and then the folk and bluegrass scene. Then there’s the jam band scene and there’s the indie scene and then there’s the metal scene...these people do not talk to each other or acknowledge each other or go to each other’s shows or really, they hate each other and that’s a bad thing.

An additional subcategory here, “Community Between Music and other Art Scenes,” also depicts the ways music communities do or do not connect to other art worlds and the consequences therein.

## **Second Theme: Place and Character**

This second theme conceptualizes respondents’ views on Denver as a place for

musical activity and the overall character of Denver’s music scenes. There is significant overlap between this theme and the previous one. For example, one respondent remarked that a drawback of Denver is that city-sponsored festivals such as *Taste of Colorado* and *People’s Fair* are “not really bringing any kind of interesting music around.” This commentary can be understood both as a remark on Denver as a scene for musical activity and as a remark on a negative aspect of Denver. Data in this second theme, however, may also be descriptive rather than evaluative.

The categories within this theme speak to the following topics: festivals and events (FST); neighborhoods (NBHD); music “scenes” (SCN); and Denver’s geographic location (GEO). Each category is divided into subcategories. These data are useful not only for providing detail for the quantitative depiction of Denver, but also for further conceptualizing the community’s strengths, weaknesses, and places for growth.

### *Categories and Subcategories*

The first category in this second theme is “events and festivals.” The data here speak to either the quantity and type of festivals and events or their perceived quality. Respondents make suggestions here for improving these events and festivals, and they also note their shortcomings. Additionally, the presence of festivals and events as an identifiable characteristic of the music community is also documented. Subcategories here refer to specific events and festivals referenced, such as the aforementioned commentary on *Taste of Colorado*.

Another category in this theme is “neighborhoods.” This category notes when respondents reference either specific neighborhoods or the relationship of neighborhoods to music. For example, an employee in a Baker neighborhood music venue remarked:

We [Hi Dive/Sputnik] do a lot of neighborhood business and the neighborhood [Baker] does a lot of neighborhood business, it's able to sustain all these businesses through the neighborhood people. So a new bar like Dougherty's, the other Irish place, has a regular clientele that comes from the neighborhood, they're there everyday, just great.

Also represented in this category are instances where neighborhood redevelopment is specifically referenced. Subcategories here reflect specific neighborhoods (e.g. Colfax, LoDo, and Baker).

A third category is “Denver’s geographic location.” This category speaks to Denver in relation to the nation, and rest of the world is also referenced. Again, there is overlap here with the previous master code when Denver’s geographic location is mentioned as an asset or liability. The data here may reference Denver’s location in regards to music directly, or, as in the case of the following passage, indirectly.

Speaking about the general appeal of the city, one respondent said:

Other than us being a red state, but when you look at just the Denver metro area we are, you know as a whole its health is a predominant factor. We're like the skinniest state in the nation. The quality, you know your outdoor, your college educated. I mean you know the way that we're fitting sort of over maybe other like major cities is different.

A common theme in this category, in fact, is the non-musical attractions of Denver, such as climate, political and cultural elements, and the Rocky Mountains, which make it appealing for musical people to live in or visit.

The final category here is "Musical Scenes." These data document the identity of different musical scenes, usually based in genre, and may also speak to positive and negative characteristics of those scenes. For example, whether a particular scene is open or closed, or homogenous or not, is exemplified in the subcategories here. As with previous categories, there are also indicators of strengths and weaknesses in the scenes in Denver.

### **Third Theme: Transformations and Innovations**

This final theme speaks to broad changes in the music industry, some of which are global transformations and some of which are specific to Denver. In this category are also innovative strategies individuals and businesses have employed to adapt to these changes. Thus, this theme reveals the sources of changes and strategies of adaptation.

Categories within this theme speak to the following topics: digitization; music as hobby; and localization of music. Each category is additionally divided into subcategories. This theme is critical for understanding how to enhance Denver's music communities in a rapidly transforming industry.

#### *Categories and Subcategories*

The first category in this third theme is "Digitization." The driving force behind these changes is understood to be the digitization of the music business: of production, distribution, consumption, and so on. The data either speak specifically to these transformations or how people have or have not adjusted. For example, a jazz musician who is also a university professor criticizes presumably traditional music business models for failing to adjust to digitization because it does not benefit them financially:

It will take a while for the powers that be to give up that old [music business] model. Because for them the top, it's still working fine. Musicians aren't getting paid, I want the whole thing to get better but those people at the top are still doing just fine.

Digitization may be viewed as a positive force for change in music in general or in Denver specifically, or a negative one. Digitization can also be referenced simply as something that is happening, but which is not yet fully understood.

A second category is “hobbyist industry.” This refers to data that characterize a new “class” of musicians, mostly those who engage in musical activities outside of their regular employment and with no real interest in professionalizing. An example is this passage:

[M]ost of the music bloggers have other day jobs. In fact, I think all of us do. My other day job, and I rely on that. People ask me, "Do you want to do Fuel Friends full-time?" And I'm like, "No!" I don't have any desire to do it full-time, because I think it would change the balance of what I'm doing. It would make it where I had to write in a certain way to get enough revenue to support myself and my son. Maybe music is moving towards that, where it's something that you do after work and on the weekends. I don't know. There will always still be big bands. Always. We're never going to not have U2 and, you know... we're never going to not have the big, huge bands, but I don't know what it's going to look like with the Internet equalizing things so much, what's going to happen to everyone else.

These data reveal that Denver supports a considerable community of part-time, hobbyist, and semi-professional music participants. The data also characterize this “hobbyist industry” as both an important part of the Denver music community and as a growing global trend.

A third category is “localization of music.” This category contains information about how transformations in the music industry (and in music production and consumption outside of the industry) have affected local music activity. For example, one respondent suggests that the availability of digital music has encouraged an interest in live music:

And, so that's it, and I think also you know just, but, but I think that what I see in Denver is the interest in live music is still very, is still considering the fact that people can hear so much music in so many places now, it's still really strong.

Data here also reveal the importance of a “local identity” to Denver music communities. This is exemplified in this comment:

You won't see Born in the Flood because they're a local band and everything. You'll see them because you like the music, so it's more like Wicked that way. But, Wicked doesn't help Denver very much. There's people who are going to go see it. It's good for the arts. But, what's different about the arts [from music], what's specific to your town, what's

really beneficial is that it comes from Denver. It doesn't have to be western. It doesn't have to be cowboy thing. It doesn't have to be a stock show. It just has to be from here to really benefit to me, to be long term sustainable. So, AG is going to bring King Tut to the Denver Art Museum. Denver Art Museum is not going to make any money off that. But, people will go see it. That's great. But, the Psychedelic Poster Show is locally curated. It's a local person, bands played, the first name title that went huge. Huge crowds, local bands came out and saw them. That was an incredibly well-attended, successful show. That's Denver bands. That's long term. That's how you build your audience.

Localized musical activity is then characterized in terms of its benefits, identities, or consequences.

## **Analyses**

The importance of this report is to present a more detailed account of the vibrancy of music in Denver than was previously available and to use reliable data to assess the city and community's strengths and weaknesses. Each of these objectives should assist policy makers in effectively serving both for-profit and nonprofit music endeavors. The subsequent analyses are then framed around these objectives, with attention paid to the impacts of changing landscapes in the music industry.

### **Strengths and Weaknesses**

From the abundance of festivals, events, and music venues, to the recent successes of nationally touring bands and the spirit of community within music scenes, there are clear indicators of Denver's vibrancy and growth. The quantitative data reported on here provide evidence that, in general, Denver has a strong music community, and that participation in terms of per capita revenues in for-profit and nonprofit music activities, as well as jobs within music-related occupations, is more prevalent within Denver than the nation as a whole.

The qualitative data also contain criticisms about the difficulties Denver musicians face with regard to touring, given the city's geographic location and the inability of music communities to connect with other artistic worlds within Denver. Overwhelmingly, interview participants spoke of an intense level of uncertainty brought on by global and local transformations of the music industry. It can be inferred that a strength or weakness of Denver's music communities is the ability to adapt to these transformations.

In this section, several of these key strengths and weaknesses are elaborated upon, as well as articulated areas for improvement that recurred in the qualitative data. First, the strengths are presented and discussed, followed by similar treatment of

weaknesses. Next, an assessment of Denver's strategies for adjusting to changes in music and music businesses is given. Analyses are followed by the policy implications of these findings.

### *Touring*

Outside of luck, there are many things that Denver musicians have done and can do to achieve recognition and financial success. One strategy that has been employed by Denver's nationally famous acts is touring. Touring not only gains the band or musician attention and fans outside of Denver, but it is something that most record labels look for when considering an act's economic viability. Labels want to know that a band will have an appeal outside of their local area and that the band is willing and able to commit to the profession on a full-time basis. The internationally successful band *Devotchka* began by touring a consistent route through the southwest, which allowed them to build up a loyal following in several cities well before being signed to their current lucrative recording contract. One member of another Denver band that has achieved national success, *Flobots*, conveyed the importance of touring nationally even after being signed. Although, as this report later discusses, it is important to establish a local scene, the success of this scene is predicated upon the success of its musicians and, accordingly, on their ability to tour nationally. Touring benefits musicians, local music scenes, and ultimately Denver's reputation as a music city.

Given the importance of touring for local and national success, Denver's relative geographic isolation is a particularly troublesome drawback. Musicians struggle here to tour on a consistent basis because city destinations require lengthy travel. Unlike on the east and west coasts, musicians in Denver must commit more time and resources (gas, time off from work, money for lodging) to tour. Where Denver's geographic location once was a deterrent for bands touring to town, it is now a liability for bands touring out of town. The expressed need is for partnerships with immediate cities (e.g. Santa Fe and Albuquerque, Lincoln and Omaha, Oklahoma City, etc.) to create a reasonable and repeatable tour route where musicians are supported by venues, lodging, and press in these towns. This presumably would allow musicians to build up the fan base and capital needed to tour beyond the region.

### *Community*

There are three dimensions of community that are implicated in the strengths and weaknesses of Denver. The first is the extent to which members of particular music scenes, usually determined by genre, form positive community relations. Expressed in the data is the idea that Denver is strong within this dimension of community: each scene is internally supportive. One common practice in this area of community is the inclusion of fellow musicians on show bills. When *Flobots* played two sold out shows at the Gothic Theater, they chose other local bands to open for them as a way to increase these other bands' crowd exposure. Like all scenes, there are issues and



some infighting, but scenes in Denver are described as intra-cooperative.

An area that was suggested by nearly all participants for improvement is community between different music scenes and between music and other art worlds. Repeated claims were made about the isolation of particular genres, such as “indie,” which has recently dominated coverage in the major music presses (e.g. Denver Post, Westword, and The Onion). These scenes are symbolically disconnected and, in some cases, physically disconnected, as areas like South Broadway and Colfax increasingly cater to rock bands, whereas heavy metal bands tend to play in the suburbs. Although there is some overlap between musicians in the jazz and classical scenes with rock scenes, this is not indicative of the overall character of Denver. The critique of Denver is that this kind of separatism ultimately results in favoritism and seeks to undermine more expansive growth of music.

There are different consequences for the inability or unwillingness of music communities to connect with film, performing and fine arts, and other artistic communities. These communities have historically been much better at gaining subsidy for their endeavors, and, as many participants suggested, this is currently the case in Denver. The argument is that the music community could benefit from the experience and expertise of these other communities, and all could benefit culturally and artistically from increased collaboration. Examples of collaboration such as the Denver Art Museum’s *Untitled* series, which brings local bands to perform at the Museum, are reminders of the potential fruitfulness of inter-artistic community building.

### *Infrastructure*

The term “Infrastructure” in this study refers broadly to actual resources that enhance music or the absence of resources that would conceivably improve the music industry in Denver. Among the most substantial infrastructure benefits is the existence of multiple digital and traditional media outlets that provide thorough and constant coverage of *local* music. The area’s largest newspaper, The Denver Post, routinely devotes print and on-line content to local music; its yearly Underground Music Showcase (UMS) has grown from three bands performing at one venue to hundreds of bands performing at 19 venues along South Broadway.<sup>8</sup>[\[8\]](#) This is similar to Westword’s extensive coverage of local music and widely successful annual Westword Music Showcase. In these ways, the press disseminate information about local bands as well as support local band-centered festivals.

Denver also has a number of nationally acclaimed bloggers, including *Fuel/Friends*, which cross-posts on the Huffington Post and has been featured on David Dye’s *World Café* on NPR. Along with other media professionals, these bloggers act as vital conduits for information about performances, album releases, tour updates, and so on. The result is a print and web-presence of Denver music both locally and

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<sup>8</sup> See appendix for additional information

nationally that equals coverage of national music acts. As one respondent put it, the media presence of Denver musicians here in Denver and nationally often makes it hard to distinguish between just “another local band” and established acts.

The number of music-related businesses and venues in Denver is also impressive. One booking agent suggested that live music can be seen at any night of the week in Denver. One glance at weekly music listings confirms this. Denver also has a number of locally-owned music and music equipment stores, in addition to national chains. Local stores, such as Twist and Shout, often support live music events, as well as sell and promote local music. There is concern that some of these locally-owned stores are in danger of closure because of competition with larger franchises, but these stores are understood to be staple assets in Denver.

Private and public sources for financial support, however, were often cited as infrastructure that is significantly lacking in Denver. References to the methods of other art communities for obtaining monetary support were frequently made to argue that the local music community does not do a good job of either capitalizing on existing funding options or lobbying for new ones. A similar critique of Denver and the U.S. was made in comparison to how Canada and other countries fund the arts. Local music members understood themselves to be vital to Denver’s cultural and economic livelihood, but not recognized as “worthy” of concomitant financial support.

### *Adaptive Strategies and Challenges*

In many ways, members of Denver’s music community share the same fears about transformations of the industry as others do nationally. Record store owners fear the consequences of digitization for the future of music sales; journalists contemplate the obsolescence of print media; musicians question whether they can make a living without selling music. As one city in a global climate of music transformation, Denver is not alone.

However, Denver is importantly situated to capitalize on the paradoxical reinvigoration of local music that is partly the result of digitization. While digitization makes music more widely (and cheaply) available, it also results in an invigoration of local music as performance and identity. For example, the number of electronic media outlets, including blogs and on-line newspapers, increase the saturation of music coverage. With little cost and relatively little effort on the musician’s part, one can gain a great deal of exposure, which often translates into music sales and increased attendance at live shows. The live show, in fact, becomes a beneficiary of digitization. With Denver’s already outstanding infrastructure for live music, the city can flourish musically under technological conditions that might otherwise bring detrimental consequences. Similarly, the legitimacy of “local” as a musical identity—often juxtaposed with “national”—is simultaneously enhanced.

Participants in this study argued for the importance of cultivating a local identity, if

not one that is sonically defined (e.g. a Denver *sound*), then one that is geographically defined.

Gastronomically, the “local foods” culture has worked similarly. The increase of globally produced foods, partly the result of technological innovations in agriculture, has caused a reaction toward a valuation of the local over the global. In Denver's internally cultivated music community, technological advancements associated with new media and digitization bring with them a lionizing of the local identity. The implications for such a growth pattern are immense, as Denver is transformed into a musical destination rather than point of departure, and a place that defines its own aesthetic instead of being defined by the aesthetics of larger cities. As one respondent put it, “[expletive] New York! This is Denver!”

## **Policy Recommendations**

Denver has the good fortune to be the home of a thriving music scene. If the city's economic development leadership wants to sustain the strength of this economic sector and build on it, they must be proactive in doing so. This study identified several strengths and weaknesses in this sector of Denver's economy. Using the findings of the study, several policy recommendations are proposed. Should the City of Denver wish to focus attention on the development of this aspect of its creative economy, the following policy-related actions should be considered.

### **Recommendation: Support Broad and Sustained Research on Music in Denver**

Many cities are pursuing creative economy strategies that include the development of music scenes. Several of these cities, such as Chicago, Seattle, and Austin, have commissioned significant studies of music scenes in order to understand how they operate and how they might be expanded. If Denver wants to successfully compete with cities that are seeking to expand their music scenes and overall creative economy, it must take proactive steps not only to sustain Denver's existing scene, but also to expand it. Continued research on the topic is one way to do this.

The research model currently employed by WESTAF, if continued, would provide a reliable and thorough source of information on the music community. In addition to technical reports, this research could be presented to the public in a number of more aesthetically engaging formats, such as promotional fliers, web material, and video and audio installations. In these ways, the research can act as a way to inform policy as well as promote and inform general audiences. It would also serve as a model that researchers across the country will look to for guidance, again enhancing Denver's reputation as a leader in cultural affairs. In addition, the research design and financial resources used for this study could provide a framework for timely, cost-effective, and CVI enriching studies of other art communities, such as film, the performing arts, and the visual arts.

**Recommendation: Level the Cost of Geographic Isolation**

Because of Denver's geographic isolation, the ability for Denver musicians to cost-effectively tour to advance their careers is very limited. Providing support for Denver musicians to tour outside the area would allow them to develop wider followings and create a business where they can export their work from Denver and bring out-of-region dollars into Denver's economy.

One way to address the disadvantages of this isolation is to identify ways to lower the cost of touring for musicians from Denver and work with them to develop successful tour schedules—schedules that will result in funds being imported into the Denver economy. One way to do this is to create funds to subsidize tours of Denver musicians outside of the state. Another is to design and implement professional development opportunities that will increase the ability of local musicians to successfully tour outside the state and bring funds back to Denver. Partnerships with other cities and musicians in the region would be another way to accomplish this. Providing logistical support in the form of tour vans would also encourage touring.

**Recommendation: Improve Inter-Sector Cooperation**

The intra-music community communication and collaboration in Denver was found to be strong; however, inter-arts collaboration was found to be weak. Because inter-arts communication and collaboration offer significant potential for new music opportunities and great synergies with the development of other art forms, ways to increase inter-arts communication and collaboration should be explored.

Additionally, inter-sector collaboration could enhance the music community as well as provide benefits to other economic sectors. Music could be paired, for example, with local business for promotional purposes, as the Colorado Rapids have done in the past. One way to accomplish the previous goal of providing logistical tour support could be to pair musicians with local business who could supply resources (e.g. finances, vans, etc.) in exchange for advertising or other exposure created by the musicians. The city could also use local music on projects that require musical accompaniment.

**Recommendation: Enhance and Enrich the Festival Scene**

Denver is home to a number of festivals. A number of these festivals garner national attention and draw sizable crowds. Some of these festivals, however, do not often make use of the quality music programming available in Denver. One way to nurture Denver's music scene is to make improvements to these and other festivals to

support the creation of high-quality events that make use of music. In addition to supporting the local music scene, such festivals will build Denver's reputation as a creative and animated city.

It would be additionally fruitful to establish partnerships with other regionally based festivals, such as South by Southwest (Austin), CMJ (New York), and festivals in the Mountain West, such as the Telluride Bluegrass festival. The city could sponsor events at these festivals, as well as offer support to Denver musicians performing at them. This could encourage the adoption by Denver festival participants and organizers of best practices utilized by these festivals.

### **Recommendation: Centralize Existing Resources for Musical Achievement**

One finding in this research is that support for music is either not widely available or publicly recognizable. Despite the need to improve Denver's music community, it also has a number of considerable strengths. What is lacking is a clear representation of these strengths and, more importantly, a centralized resource for musicians seeking to capitalize on these strengths. The city should investigate ways of making existing and future resources more widely known and easily accessible.

Cities such as Seattle have established specific offices, the mayoral office in the case of Seattle, to guide the development of music. There have been efforts to create similar organizations in Denver, but they have been unsuccessful, not for a lack of enthusiasm. The resources for sustaining such an organization were simply not found. Given the number of professional music industries in Denver and volume of musicians who have had national success, Denver has a great deal of community wisdom regarding the industry. It would be beneficial to formally organize this knowledge and these resources. Establishing a city office of music is only one way to accomplish this goal. Partnering with the music community, perhaps through a *Create Denver* initiative, to establish a music resource center would be another.

## **Future Study**

This research provides a much needed, albeit limited view of the vibrancy of music as an economic activity in Denver. While it can be argued that music contributes substantially to Denver's overall creative vitality, it cannot yet be determined how influential music is. Additionally, the breadth of musical activity, which in Denver is suspected to be sizable, has yet to be measured. Therefore, the quantitative method of assessing Denver's music communities needs to be both refined and expanded. The same is true of the qualitative design. Additional sources of data are needed to understand this complex community.

A recommendation of this report is to treat this initial research as preliminary investigation for a much larger project. It is recommended that this triangulated

research design be refined, expanded, and executed in the immediate future. One question to consider is the sustainability of the growing festival scene in Denver. How can the community nurture festivals and other activities that work toward building Denver's national reputation? Neighborhood growth and development is also an area of interest. What role has music played in neighborhood redevelopment? Research should also consider the import/export dynamics of Denver's music community. What economic or cultural impacts are attributable to touring or local music sales? Similarly, do musicians "raised" in the Denver music scene stay or move elsewhere when they achieve success? Denver should also consider how the diversity of the city is (or is not) reflected in its music community. Meeting the city's commitment to diversity means understanding the role that music plays in it. The rapidly changing nature of the music industry requires close attention to the impacts of digitization on music. How is the music media landscape shaped by digitization? What impact has digital music had on local musicians and businesses? In addition to these and other questions, the strengths and weaknesses of the music community should continue to be directly assessed. Collaboration between DOCA and WESTAF researchers should occur to generate additional research questions.

## **Appendix**

### **CVI Data Sources**

- The Urban Institute's National Center for Charitable Statistics aggregates information from the Internal Revenue Service's 990 forms. The forms are required to be submitted by nonprofit 501(c) organizations with annual gross receipts of \$25,000 or more. Organizations with more than \$25,000 but less than \$250,000 in annual gross receipts can file a 990 EZ form that collects less information. The CVI uses the information contained in the 990 forms to identify changes in charitable giving in an area. These numbers are the best available but are not absolute. Some numbers may not be reported because of errors made in the completion of the form. These include nested fund transfers within larger fund allocations that include the arts in a significant way but are not broken out, and/or the failure to capture data because an organization is either not required to file a 990 or does not file the full 990 form, thus limiting the level of data available.
- Economic Modeling Specialists, Inc.'s (EMSI) expertise is centered on regional economics, data analysis, programming, and design so that it can provide the best available products and services for regional decision makers. In an effort to present the most "complete" possible picture of local economies, EMSI estimates jobs and earnings for all workers using Bureau of Labor Statistics data, data from the U.S. Bureau of Economic Analysis, and information from the U.S. Census Bureau. Because the number of non-covered

workers in a given area can be large, job figures from EMSI will often be much larger than those in state LMI data. In order to estimate occupation employment numbers for a region, EMSI first calculates industry employment, then uses regionalized staffing patterns for every industry and applies the staffing patterns to the jobs by industry employment data in order to convert industries to occupations. EMSI bases occupation data on industry data because it is generally more reliable and is always published at the county level, whereas occupation data is only published by Occupational Employment Statistics (OES) region (usually 4-6 economically similar counties). Occupation employment data includes proprietors and self-employed workers. EMSI uses nearly 90 federal, state and private sources including the U.S. Department of Commerce, the U.S. Department of Labor, The U.S. Department of Education, the U.S. Department of Housing and Urban Development, The U.S. Department of Health and Human Services, the U.S. Postal Service, and the Internal Revenue Service.

*(Partially Reprinted from [www.economicmodeling.com](http://www.economicmodeling.com) )*

**Table: CVI Codes**

Music Data Description	Category
Musical instrument and supplies store	NAICS 451140
Prerecorded tape, CD, and record sales	NAICS 451220
Musical groups and artists	NAICS 711130
Music	NTEECC A68
Symphony Orchestra	NTEECC A69
Opera	NTEECC A6A
Singing and Choral Groups	NTEECC A6B
Bands and Ensembles	NTEECC A6C
Radio	NTEECC A34
Performing Arts Schools	NTEECC A6E
Music directors and composers	SOC 27-2041
Musicians and singers	SOC 27-2042
Radio and television announcers	SOC 27-3011
Audio and video equipment Technicians	SOC 27-4011
Sound Engineering Technicians	SOC 27-4014
Musical instrument repairers and tuners	SOC 49-9063

## **Interview Schedule**

### **Topic: Introductory and General Questions**

How would you like to be identified in this study? Age? Economic status?

Occupation? Gender? Race? Sexuality? Organization? Anonymous?

What is your particular role in this community? How long have you been active and in what ways?

Why do you believe people to participate within a music community?

### **Topic: The effect of digital media on local music**

How has the digitization of music and music-related media affected you? How do you think this affects Denver specifically? (Potential probing questions: What are the effects on music quality, availability, sales, community? How would you characterize the benefits and drawbacks to digitization?) What do you see as the consequences of the rise of music reporting on the Internet e.g. blogs and other online publications. How do you believe this impacts local artists? What kind of support networks are necessary to help local artists in a changing music landscape? How do you feel about the economic viability of the music industry? (Probe: business, individuals, other areas of music communities?)

**Topic: Music venues and redevelopment** How do you feel about the economic viability of the music industry? Publications? Bands? Venues? Other organizations? How do you think music venues have contributed to neighborhood redevelopment in Denver? Do you believe that music venues contribute positively to the economic health and cultural vibrancy of an area? Do you believe that there is a relationship between music genres and the level of cultural significance that can be applied to an area? Why do you believe people to participate within a music community? Do you see music as an alternative to creating nodes of economic vitality within the city? How do you see music venues as playing a role in redevelopment efforts on Colfax, Broadway, and Larimer areas? How do you see these locations as advantageous or disadvantageous from both a community development and economic development standpoint?

### **Topic: City and Policy**

Is there a musical "identity" to Denver? (Probe: if so, what is it? If not, why? Or are there multiple identities?)

From a national perspective how is Denver viewed as a music market? How do you believe Denver compares to other markets as a "music city"? What disadvantages exist for Denver as a music community? What kinds of support can be administered to mitigate these disadvantages? What advantages exist for Denver as a music community? What kinds of support can be administered to further capitalize on these advantages?

### **Topic: Musicians**

How do you feel being a band/musician from Denver effects your career? What types of opportunities do you feel were given to you because you were from Denver? What types of opportunities to you feel you were excluded from because



you were from Denver?

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Are there other topics that we should address or things you'd like to speak to?

Table: Denver CVI compared to Nation

Description	Region A	Region B	CVI	Weightage	CVI Contribution
<b>Year -</b>					
<b>Region A - Denver</b>					
<b>Region B - United States</b>					
Population	598,707	304,059,724			
Industry Data					
Photo Store Sales	3,054,000	1,426,736,000	1.087	8%	0.087
Music Store Sales	12,586,000	3,064,022,000	2.086	8%	0.167
Book Store Sales	27,072,000	8,640,277,000	1.591	8%	0.127
Art Gallery Sales	139,604,000	34,129,019,000	2.077	8%	0.166
Performing Arts Sales	73,570,000	14,086,245,000	2.652	8%	0.212
Non Profit Data					
Arts Organization Revenue	148,689,375	14,520,426,857	5.201	10%	0.520
Arts Active Organization Revenue	120,952,842	16,107,694,069	3.814	10%	0.381
Occupation Data					
Jobs	18,025	4,361,087	2.099	40%	0.840
<b>Total CVI</b>					<b>2.5</b>

CVI Contribution

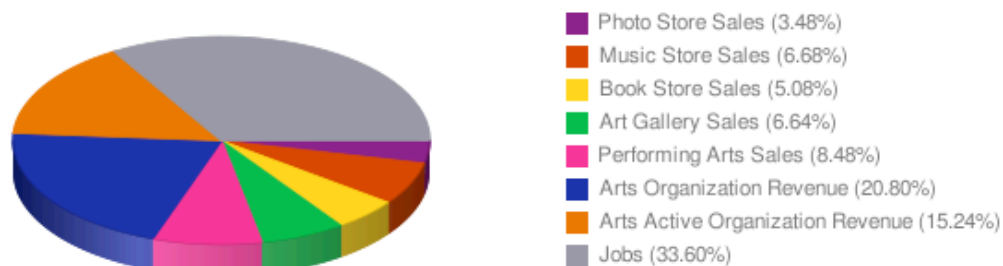


Table: Denver CVI Compared to Mountain West

Description	Region A	Region B	CVI	Weightage	CVI Contribution
<b>Year -</b>					
<b>Region A - Denver</b>					
<b>Region B - Arizona, Colorado, Idaho, Montana, New Mexico, Utah, Wyoming</b>					
Population	598,707	19,184,340			
Industry Data					
Photo Store Sales	3,054,000	68,151,000	1.436	8%	0.115
Music Store Sales	12,586,000	179,862,000	2.242	8%	0.179
Book Store Sales	27,072,000	544,135,000	1.594	8%	0.128
Art Gallery Sales	139,604,000	1,720,510,000	2.600	8%	0.208
Performing Arts Sales	73,570,000	464,320,000	5.077	8%	0.406
Non Profit Data					
Arts Organization Revenue	148,689,375	707,708,343	6.732	10%	0.673
Arts Active Organization Revenue	120,952,842	580,807,889	6.673	10%	0.667
Occupation Data					
Jobs	18,025	274,406	2.105	40%	0.842
<b>Total CVI</b>					<b>3.218</b>

### CVI Contribution

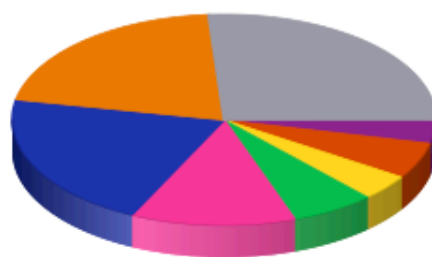


Table: Growth of Denver Post Underground Music Showcase

Year	# of Bands	# of Venues	Attendance
2009	220	19	5000
2008	150	16	2500
2007	80	11	1000
2006	27	5	750
2005	3	1	500
2004	3	1	600
2003	3	1	580
2002	3	1	250
2001	1	1	700

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